



# Welcome!

## Using Mail Merge for Student Acknowledgement

*Penny Pearson, Facilitator*

# Mail Merge

Personalize communication with students

3 parts: Main document, data source, results

Results are: letters, name badges, certificates, labels, email...

The Process...

Then Practice!!



Penny talks about mail merge – 3 parts

Data source (from tops pro)

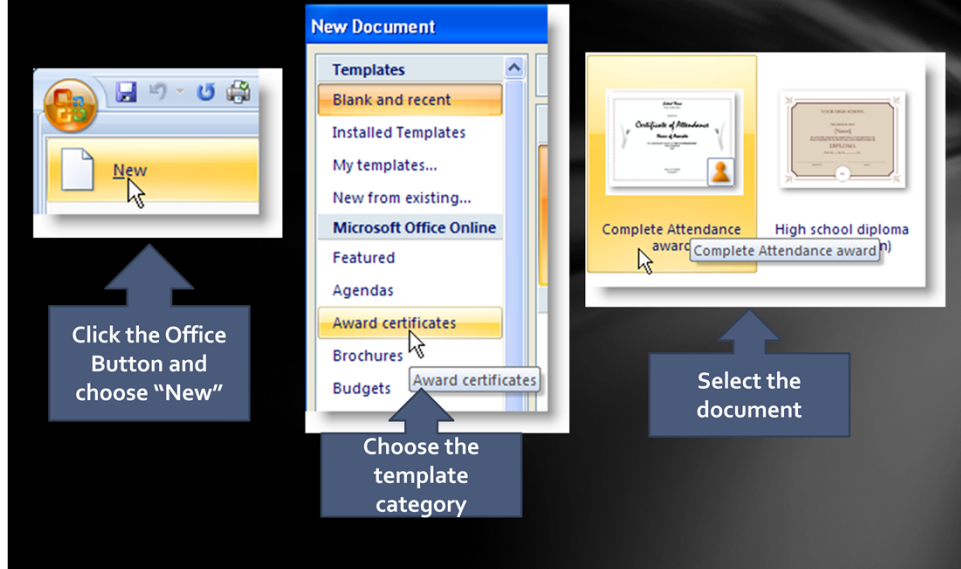
Main document ( certificate, labels, letters etc.)

Results - your data showing up on the main document as a new “set” of letters, labels, certificates, etc.

Use the main document over and over again with different data sources.

Show how to “pick” from within data source different criteria – i.e. hours vs 2 level gains, vs EL Civics etc... [Use select recipients and ‘filtering’ for this... easier than doing Excel as a database. ]

## Create your main document



The steps are similar in Word 2003.

Most templates can be "downloaded" from the Microsoft Office site.

## Customize your document

*School Name*  
School complete address

presents this

*Certificate of Attendance*  
to  
*Name of Awardee*

for completing the seminar on "*Name of Activity/Seminar*"  
Held at the (place)  
Date

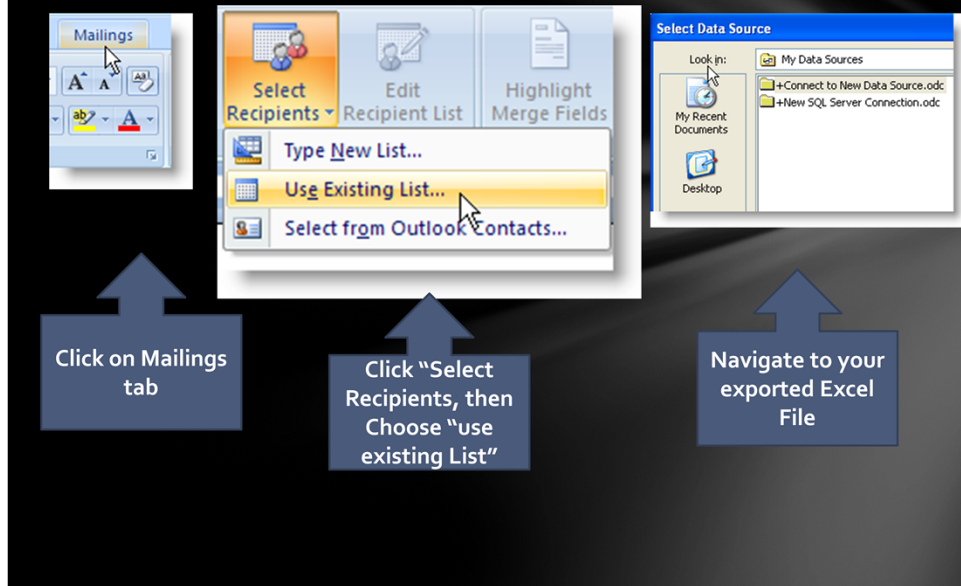
Name of Facilitator  
Designation

Add 'static' information (it doesn't change)

Open the file *Certificate of Attendance Main Document.doc* from the resource CD.

Select the text for School Name and fill it in with your school's information. Do the same for the address, and any other information you want reflected on each certificate

## Link your document to your data



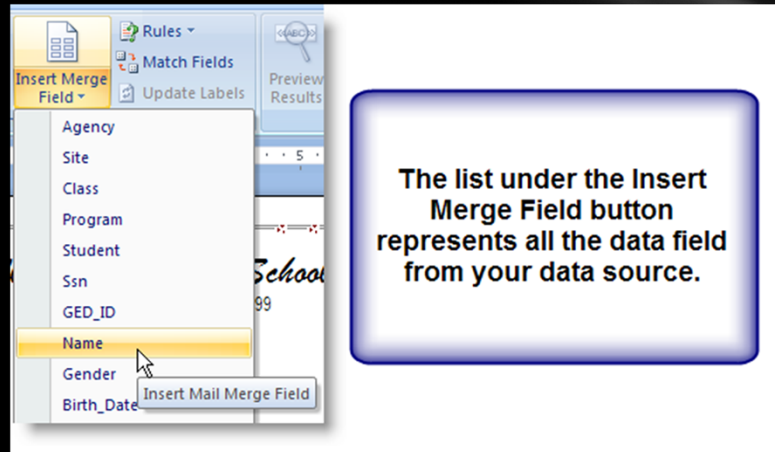
To customize the information on what class was completed and what program, specific fields need to be added to replace the text *"Name of Activity/Seminar."* To do this, you must *link* the data file (*Session Roster for 2009*) to our main Certificate document.

Click on the Mailings tab in the Ribbon and click on Select Recipients.

Click on Use Existing List. In the Select Data Source window navigate to where your data file is stored. Select it and click Open.

In the Select Table dialog box, you must select which sheet within your workbook is the one that has the information on it you wish to use. In this case for the Session Roster, choose PPs Monitor and click OK.

## Embed Personalized Fields



The next steps involve placing the correct field names where you wish the data to appear on your certificate. Select the text *Name of Awardee*.

## Select "Name of Awardee"



Be sure your cursor is where  
you want your data to  
appear!

Now click on the Insert Merge Field from the Mailings Ribbon at the top of the page.

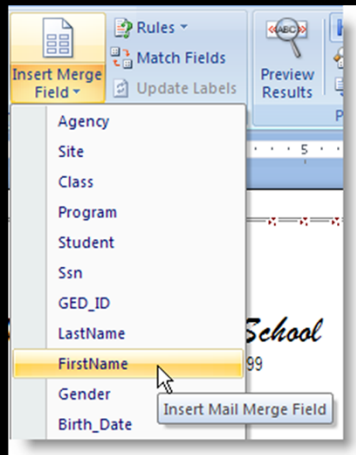
Click on Name to insert that field into your Certificate document. It appears like this: <<Name>> The brackets indicate this is a data field. Do not try and TYPE this into your document. You must use the Insert Merge Field option.

Next you must enter the fields that represent the program, class and any other information you want on your certificate. Select the text "seminar on "Name of Activity/Seminar."

Click on the Insert Merge Field button and select Program to insert this field into your certificate.

Follow the same process to insert the field Class after Program. (Be sure you put a space between the two field!)

## Add your field names

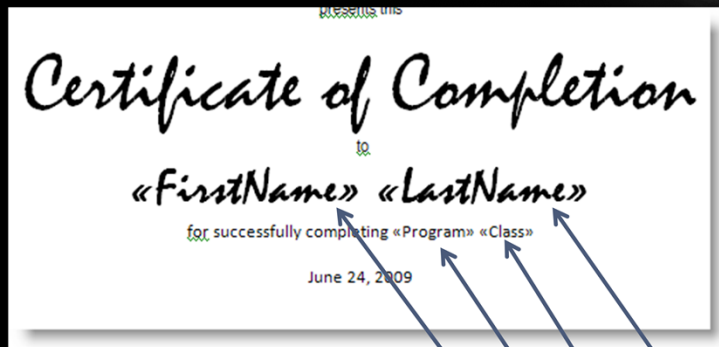


Click "Insert Merge Field" drop down

Click FirstName (or any other field you want to appear in this spot)

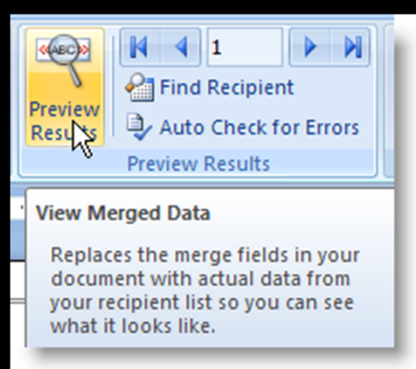


## Continue inserting fields



When you complete the merge, each field will display the data in your Excel worksheet. Don't forget spaces and punctuation!

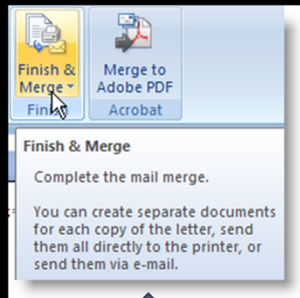
## Preview your document



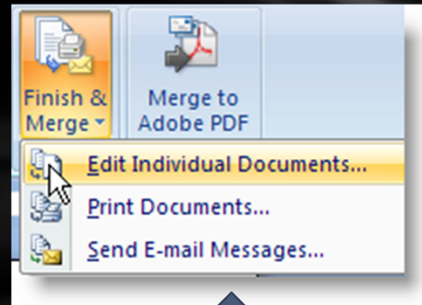
Use the navigation buttons to preview all your recipients.

to  
*Darius Doha*  
for successfully completing ESL 110 - Low Beginning  
June 24, 2009

## Ready to merge!

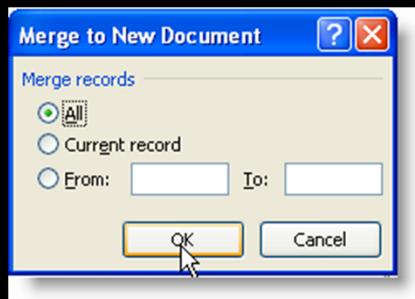


Click on "Finish & Merge" in the ribbon



Choose "Edit Individual Documents" to get a separate file of *each* of your records. You can add special information to a certificate that was not in your data document.

## Merge options



Choose your merge options. Click OK.

# MAGIC! 😊

